



**Home Office**  
 12701 Whitewater Dr.  
 #200  
 Minnetonka, MN 55343  
 (Main) 763-404-7100  
 (Toll Free) 800-695-2261  
 (Fx) 763-522-6251

**Florida Sales Offices**  
 Boca Raton/Miami, FL  
 (Main) 763-404-7100  
 (Toll Free) 800-695-2261  
 (Fax) 763-404-8390

**East Coast Sales Office**  
 Wall, NJ  
 (Main) 201-747-2140  
 (Toll Free) 800-695-2261

**Colorado Sales Office**  
 Denver, CO  
 (Main) 763-404-7100  
 (Toll Free) 800-695-2261  
 (Fax) 763-522-6251

Leadership Team	Email	Phone	Fax
Bill Dolan, President, Partner	bdolan@sbgrouppinc.com	763-404-7100	763-522-6251
Jeff Kehne, Controller/Operations Manager	jkehne@sbgrouppinc.com	763-404-8383	763-404-8391
Jeremy Robeck, Executive Vice President, Partner	jrobeck@sbgrouppinc.com	763-404-7112	763-404-8367
Mike Helmbrecht, Vice President of Client Services	mhelmbrecht@sbgrouppinc.com	763-404-7113	763-404-8368
Renae Guetzkow, Client Services Manager	renaeg@sbgrouppinc.com	763-404-7107	763-404-8365
<b>Relationship Management Team – External</b> <i>Point-Of-Sale Assistance, Business Development</i>			
Ann Feldman, CLU®, Business Development Consultant	afeldman@sbgrouppinc.com	763-404-8387	763-404-8390
Bryce Bohl, Business Development Consultant	bbohl@sbgrouppinc.com	612-251-9167	763-404-8375
Dave Foley, CLU®, ChFC®, CLTC®, National Director – LTC and Linked Benefits	dfoley@sbgrouppinc.com	763-404-7103	763-404-8378
John McGuinness, Vice President, Business Development Consultant	jmcguinness@sbgrouppinc.com	201-747-2140	763-522-6251
William Meredith, Business Development Consultant	wmeredith@sbgrouppinc.com	816-769-4402	763-404-8379
Mario Montalvo, CFP®, Vice President Southeast Region and Foreign National Markets	mmontalvo@sbgrouppinc.com	949-899-4127	763-404-8369
Shawn Sullivan, CLU®, ChFC®, Business Development Consultant	ssullivan@sbgrouppinc.com	763-404-7111	763-404-8366
<b>Relationship Management Team – Internal</b> <i>Product Illustrations, Case Design, Advanced Planning, Product Selection</i>			
Debbie Hull, CLTC®, Long-Term Care Specialist	dhull@sbgrouppinc.com	763-404-8381	763-404-8389
Howie Treff, Annuity Sales Director	htreff@sbgrouppinc.com	763-404-8385	763-404-8386
Neil T. Howe, CLU®, ChFC®, Advanced Planning Specialist	nhowe@sbgrouppinc.com	763-404-7106	763-404-8364
Pam Sands, Business Development Specialist	psands@sbgrouppinc.com	763-703-5364	763-404-8374
Patti Koop, DIA, CLU®, Case Design And Product Specialist	pkoop@sbgrouppinc.com	763-404-7119	763-404-8373
<b>Agency Services Team – New Business</b> <i>New Business Processing, Application Forms, Case Status, Underwriting, Contracting &amp; Licensing</i>			
Carol Keliholokai, Senior Case Manager	carolk@sbgrouppinc.com	763-703-5361	763-404-8361
Cathy Montoya, Licensing & Contracting Specialist	cmontoya@sbgrouppinc.com	763-703-5362	763-404-8362
Courtney Rohe, Client Services Specialist	crohe@sbgrouppinc.com	763-404-7118	763-404-8377
Erin Enna, Senior Case Manager	eenna@sbgrouppinc.com	763-703-5363	763-404-8376
Jean Hall, Senior Case Manager – Underwriter	jhall@sbgrouppinc.com	763-404-7117	763-404-8372
Kim Nelson, Senior Case Manager	knelson@sbgrouppinc.com	763-404-8382	763-404-8392